

TOURISM
BRITISH
COLUMBIA



2003

2002

2001/01

Three Year

BUSINESS PLAN

Highlights

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Tourism British Columbia's vision is to be a recognized world leader in tourism destination management. We work cooperatively with industry partners to promote the development and growth of B.C.'s tourism industry and ensure its long-term success.

Tourism British Columbia's mission is to exceed our customers' expectations by providing leadership and programs that ensure the success of the British Columbia tourism industry, which results in a quality visitor experience.

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Sharing Our Vision

As we enter the new millennium, the face of the global economic landscape is changing. New patterns and opportunities have appeared, with technology, communications, and the service industries emerging as key contributors to the economy in North America and Europe. Within the service sector, tourism has taken the lead to become the single largest industry in the world.

The World Tourism Organization estimates that in the next ten years global visitation will reach 1 billion, up from 635 million in 1998. In the same period, international tourism receipts are forecast to reach \$1.5 trillion. In British Columbia, tourism's contribution is an integral component of the provincial economy.

GLOBAL TRENDS IN TOURISM

Demographic factors are driving the growth of tourism, with the aging population worldwide representing one of the most significant forces. As disposable income and leisure time increase, travel has become a priority for this growing segment of the population.

Technology is another major factor influencing the world travel scene; the growing use of the Internet is creating more educated and sophisticated travellers. Travel decisions can be made instantly, online – at the consumer's convenience. It is estimated that travellers spent more than \$12 billion in online bookings in 1999. This represents 3% of the total travel business worldwide and is forecast to increase to 10% by 2003.

We are also seeing changes in the type of travel experiences being sought, with an increasing demand for specialty tours that cater to interests such as outdoor adventure, culture, education and wellness. There is a growing trend for consumers to take getaways, often booking on short notice. Cost sensitivity also influences travel decisions, with consumers looking for the best value for their travel dollars.

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Along with industry growth and change, comes intense international competition. Competitors worldwide are strengthening their efforts to capture tourist dollars by making investments in transportation, infrastructure, development and marketing. To add to the competitive mix, developing countries are emerging as serious contenders in the global tourism marketplace, with nations in Africa, Asia and South America making a strong appeal to international travellers.

Among world travel destinations, British Columbia is in an enviable position to deliver many of the most sought-after tourism products, with a unique mix that combines spectacular scenery, outdoor adventure, cultural and cosmopolitan city experiences. However, given the intense and growing competition for visitors worldwide, great products alone are not enough. In order to maintain and increase British Columbia's share of tourist dollars, tourism products must be professionally marketed and supported. And that is where Tourism British Columbia plays a role.

TOURISM BC'S ROLE

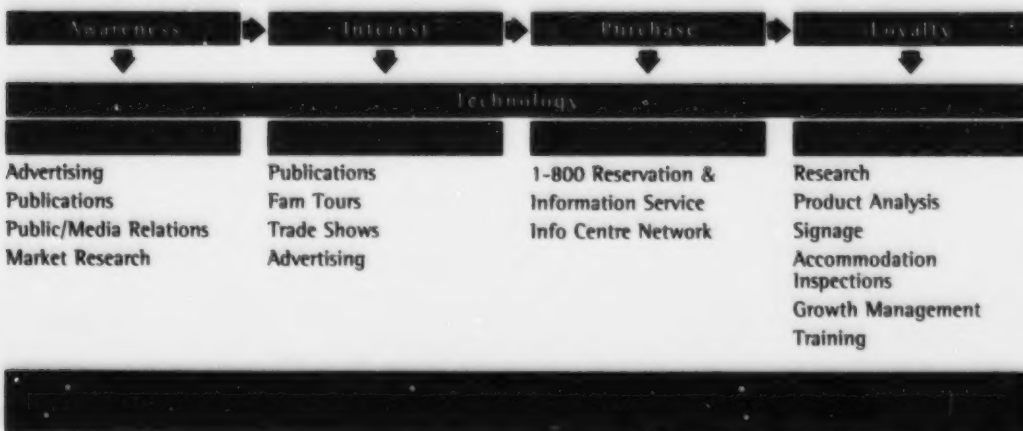
Tourism BC brings together the diverse interests of those who have a stake in the industry's success – from sector associations, City and Regional Destination Marketing Organizations to individual operators and the public. The corporation's role is to foster success by combining the resources available to industry, and by providing information, the tools and the vision that will make B.C. a leader among world travel destinations.

Established in 1997 as an independent Crown Corporation, Tourism BC's unique model of corporate governance reflects its mission. Self-sufficient and industry-led, the Board of Directors is representative of the tourism industry. The Directors are actively involved in tourism, bringing the skills, knowledge and experience needed to support the industry's long-term development.

A MARKET-DRIVEN, INDUSTRY-RESPONSIVE APPROACH

Operating in the increasingly competitive environment of tourism destination management calls for a disciplined, professional approach. Tourism BC's organizational structure reflects a strategic focus on each of the core areas across the consumer purchase cycle, as illustrated in the diagram that follows.

The Consumer Purchase Cycle



INTEGRATED OPERATIONS

The ubiquitous presence of technology and the Internet will accelerate both the consumer purchase cycle and competition. To strengthen Tourism BC's competitive edge in this evolving environment, operations are integrated to deliver programs that build relationships with consumers and enhance their B.C. experience, from the first point of contact through to on-going communication.

The Marketing & Sales division develops consumer and trade marketing programs that are based on consumer research and targeted to markets identified as priorities. By participating in these programs, British Columbia tourism businesses and international tour wholesalers can leverage their marketing dollars to reach potential visitors. Tourism Operations deals directly with visitors and industry to improve the quality of the tourism product and enhance the visitor experience. Business Development focuses on industry needs, seeking innovative ways to generate funding and providing information and tools that foster industry development. Internal support for the corporation's activities is provided by the Corporate Services and Human Resources Development divisions.

A THREE-YEAR PLAN

As part of the formal planning process, this Business Plan was developed with a three-year horizon to provide a long-term view of Tourism BC's vision and direction. The highlights presented here outline goals and strategies that each division of the corporation has developed to support the overall goal of increasing British Columbia's share of the world tourism market.

CORPORATE GOALS AND STRATEGIC PRIORITIES

In developing this three-year Business Plan, Tourism BC has been guided by a number of imperatives – one of the most important being the need to make effective use of technology to streamline internal operations and address the growing popularity of the Internet as a source of travel information and bookings. The need to develop tourism products that address consumer demand – in terms of timing and types of product – is also a key driver of this three-year business strategy.

Above all, the corporation's strategy is guided by the need to keep visitors happy – to ensure that the quality of their visit keeps them coming back for more. Beyond accommodations and attractions, the quality of the visitor experience – that intangible, yet powerful human connection – is the key to building loyal customers. The people who work in the tourism industry – now one in twelve British Columbians – are considered to be among the best in the world.

Industry members are encouraged to take advantage of the support offered through Tourism BC programs. Details on specific tactics and how to participate in programs are provided in the Program Guide. A broader view of Tourism BC's corporate goals and strategic priorities follows.

TOURISM BC GOALS

Industry Support

- Assist the tourism industry in delivering experiences and services that match the needs of domestic and international visitors.
- Develop partnership opportunities to help industry obtain the critical mass necessary to effectively impact the market.

Performance

- Contribute to the tourism industry's achievement of tourism revenues of \$9.5 billion in 2000 and \$10.3 billion in 2002.
- Use technology to effectively communicate with consumers and stakeholders.

Economic Benefits

- Ensure the economic benefits of tourism are spread across the province's six tourism regions, key product sectors, and seasons in accordance with capacity and consumer demand.

Corporate Development

- Introduce and instill a "values-based" corporate culture within Tourism BC.
- Effectively deploy the corporation's human and financial resources.

TOURISM BC STRATEGIC PRIORITIES

Marketing

- Build consumer and trade awareness and purchase interest in Super, Natural British Columbia and Regional sub-brands through highly targeted, integrated communications which have a strong call to action.
- Maintain a balanced portfolio, concentrating marketing investment in high priority markets and product segments.
- Build a direct and lasting relationship with consumers.

Technology

- Develop an integrated technology base to enhance internal operations and facilitate more direct access for industry and consumers.

Customer Service

- Build relationships with new and existing customers by improving access to services through the use of technology and by enhancing the Visitor Info Centre program.

Revenue

- Explore new and incremental revenue opportunities.

Research

- Maximize the use of consumer research as a basis for decision-making and develop new research methodologies to track consumer travel patterns.

Value for Money

- Demonstrate value for money by using performance measurements to evaluate and improve existing programs.

In order to achieve these corporate goals, the following strategic priorities have been established for the next three years.

FINANCIAL COMMITMENT

To achieve the corporate goals, Tourism British Columbia will invest \$28.9 million in 2000/2001. Over the next three years, it is estimated that Tourism BC's investment will total \$86 million.

The principal source of Tourism BC's revenue is directly tied to the accommodation industry. Through a legislated funding formula, the corporation receives 1.65 points of the 8% B.C. Hotel Room Tax. Tourism BC's success in increasing visitor revenue will lead to greater hotel room earnings and in turn, an increased budget for the corporation which will be reinvested in program activities.

PROJECTED REVENUE AND EXPENSES

FISCAL 2000/2003

	2000/2001	2001/2002	2002/2003
Projected Sources of Revenue (\$000s)			
Hotel Room Tax	21,792	22,445	23,119
Program Revenue	4,762	5,002	5,333
Investment Income	205	130	90
Total Projected Revenue	26,759	27,577	28,542
Projected Expenses (\$000s)			
Marketing & Sales	10,588	10,588	10,588
Tourism Operations	10,442	10,088	10,119
Business Development	3,309	3,145	3,311
Corporate Services	2,282	2,282	2,282
Human Resources Development	502	502	502
Corporate Contingency, CEO's office, & Board	1,030	1,030	1,030
Amortization	730	925	1,125
Total Projected Expenses	28,883	28,561	28,957
Expenses over Revenues⁽¹⁾	2,124	984	415

⁽¹⁾ To be funded by unappropriated surplus.



Rod Harris
President and Chief Executive Officer

Tourism Industry Overview

The B.C. Perspective

Tourism makes a significant and growing contribution to the provincial economy, measured in terms of creating jobs and revenue. Currently, there are approximately 16,700 tourism-related businesses throughout the province with 113,000 people employed in jobs directly related to tourism. The most recent Gross Domestic Product figures show that the tourism industry contributed \$4.1 billion to the provincial economy in 1997.

1999 VISITOR VOLUME & REVENUE

In 1999, a total of 22.3 million visitors arrived in British Columbia, an increase of 2.1% over 1998. Tourism revenues increased by \$426 million over 1998 to reach \$9.2 billion in 1999.

Currently, 85% of B.C.'s tourism revenue comes from nine core markets, with North America representing the largest source of visitors and revenue. In 1999, the total number of North American visitors to British Columbia grew by 1.7% to reach 20,600,000.

The recent decline in visitors from Asia/Pacific has started to reverse, with visitation increasing by 8.9% to reach 843,000 in 1999. European markets remain a significant source of visitors and revenue, with total European visitation increasing by 7.8% for a total of 671,000 visitors in 1999.

B.C. TOURISM INDUSTRY OUTLOOK

British Columbia's tourism industry is expected to grow steadily over the next three years. Worldwide markets are stabilizing, with North America offering substantial potential for growth. The strongest growth is expected to come from the United States. The Asia/Pacific and European markets represent continued growth potential, and emerging markets of Southeast Asia and China present long-term opportunities. There are many factors which may influence the industry over the next three years, one of the most significant being Air Canada's buyout of Canadian Airlines.

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Three-Year Outlook by Overnight Visitor Market Volume (000's)

	1999 Overnight Visitors	% Change Overnight Visitors 98 to '99	Forecast Overnight Visitors 2000	Forecast % Change Overnight Visitors '99 to '00	Forecast Overnight Visitors 2001	Forecast % Change Overnight Visitors '00 to '01	Forecast Overnight Visitors 2002	Forecast % Change Overnight Visitors '01 to '02	Forecast % Change in Visitors 1999-2002 (3 yrs)
Asia/Pacific	843	8.9	856	1.6	888	3.8	920	3.6	9.2%
Other Overseas	144	1.6	148	3.0	156	5.0	163	5.0	13.6%
Total	22,258	2.1	22,640	1.7	23,109	2.1	23,591	2.1	6.0%

Projections are estimates which are updated quarterly to reflect ongoing changes in markets. Most recent update March 2000.

In the year 2000, overnight visitation from all markets worldwide is forecast to increase by approximately 1.7% or 380,000 visitors to a total of 22.6 million. Over the next three years, total worldwide visitation is forecast to increase by approximately 6.0% to 23.6 million, for a total incremental increase of 1.33 million visitors over the three-year period.

Three-Year Outlook by Overnight Visitor Revenue (\$millions)

	1999 Total Overnight Visitor Revenue	% Change Overnight Revenue 98 to '99	Forecast Overnight Revenue 2000	Forecast % Change Overnight Revenue '99 to '00	Forecast Overnight Revenue 2001	Forecast % Change Overnight Revenue '00 to '01	Forecast Overnight Revenue 2002	Forecast % Change Overnight Revenue '01 to '02	Forecast % Change in Revenue 1999-2002 (3 yrs)
Asia/Pacific	911	11.1	940	3.1	991	5.4	1,042	5.2	14.4%
Other Overseas	74	3.1	77	4.5	82	6.6	88	6.6	18.7%
Total	9,197	4.9	9,515	3.4	9,882	3.9	10,265	3.9	11.6%

Projections are estimates which are updated quarterly to reflect ongoing changes in markets. Most recent update March 2000.

Total revenue is forecast to grow by approximately 3.4% or \$320 million to reach \$9.5 billion for the year 2000. Revenue growth from all markets is expected to continue over the next three years, increasing by approximately 11.6% to 10.3 billion during 2002, for a total incremental revenue increase of \$1.1 billion from 1999 to 2002.

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North America	20,600	1.7	20,954	1.7	21,370	2.0	21,797	2.0	5.8%
Asia/Pacific	843	8.9	856	1.6	888	3.8	920	3.6	9.2%
Europe	671	7.8	682	1.6	695	1.9	710	2.2	5.8%
Other Overseas	144	1.6	148	3.0	156	5.0	163	5.0	13.6%
Total	22,258	2.1	22,640	1.7	23,109	2.1	23,591	2.1	6.0%

Percentages are estimates which are rounded separately to reflect rounding changes in markets. Most recent update: May 1999.

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North America	7,529	3.8	7,793	3.5	8,079	3.7	8,378	3.7	11.3%
Asia/Pacific	911	11.1	940	3.1	991	5.4	1,042	5.2	14.4%
Europe	683	9.3	705	3.2	729	3.5	757	3.8	10.8%
Other Overseas	74	3.1	77	4.5	82	6.6	88	6.6	18.7%
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Marketing & Sales

Extending Our Reach

Tourism British Columbia's Marketing & Sales division works with industry to develop and deliver compelling, cost-effective marketing programs targeted to key markets, consumer segments and the travel trade. These programs are designed to build awareness and motivate the purchase of B.C. tourism product experiences.

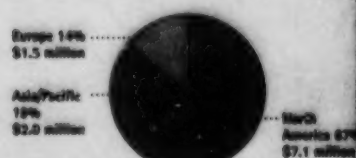
To achieve its objectives, the division has adopted an integrated marketing approach. Resources are invested in a variety of consumer and trade activities, including advertising and promotion, the Internet, publications, media relations, trade promotions, trade shows and familiarization trips, and marketing research. The division's major initiatives include the Tourism Partners program, the BC Escapes getaways program, and Canada's West Marketplace.

Marketing & Sales Goals

- Develop B.C.'s tourism potential from primary target markets among high potential travellers across a range of product experiences.
- Spread the economic benefits of tourism throughout the province and across seasons.
- Leverage financial resources to achieve critical mass and provide opportunities for tourism businesses to collectively reach target markets.

Marketing & Sales Expenditure Summary 2000/2001

Total Budget: \$10.6 million



North America

North America is B.C.'s major market: large and close by, it generates 82% of total visitor revenue. Tourism BC's marketing programs promote quick getaways and longer-stay vacations to North American visitors, featuring different regional destinations and offering a broad range of products in every season. Working with the Canadian Tourism Commission (CTC), the Tourism Alliance and many B.C. partners, Tourism BC helps develop partnerships to reach common target markets.

VISITOR VOLUME & REVENUE

B.C. resident spending on travel within the province remains the single largest source of tourism revenue, contributing \$2.4 billion of revenue in 1999. Visitors from regional Canada contributed \$1.7 billion and visitors from long-haul Canadian markets contributed \$1.0 billion in revenue. U.S. visitors generated \$2.3 billion in revenue in 1999, and visitors from Mexico contributed \$41 million.

Over the next three years, total North American visitor volume is forecast to increase by 5.8% to 21,797,000. This represents an increase of 1,197,000 visitors. During the same period, total North American visitor revenue is expected to increase 11.3% or \$849 million to \$8.38 billion.

North America Overnight Visitor Volume (000's)

Total	20,600	1.7	20,954	1.7	21,370	2.0	21,797	2.0	5.8%

Projections are estimates which are updated quarterly to reflect ongoing changes in markets. Most recent update March 2000.

North America Overnight Visitor Revenue (\$millions)

Total	7,529	3.8	7,793	3.5	8,079	3.7	8,378	3.7	11.3%

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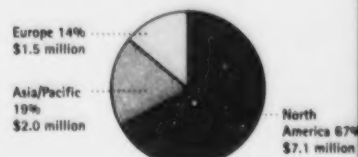
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British Columbia	10,654	0.0	10,761	1.0	10,922	1.5	11,086	1.5	4.1%
Regional Canada	3,646	1.8	3,712	1.8	3,779	1.8	3,848	1.8	5.5%
Long Haul Canada	1,181	1.5	1,202	1.8	1,223	1.8	1,245	1.8	5.4%
United States	5,059	5.3	5,211	3.0	5,367	3.0	5,528	3.0	9.3%
Mexico	59	14.4	68	15.0	79	15.0	90	15.0	52.1%
Total	20,600	1.7	20,954	1.7	21,370	2.0	21,797	2.0	5.8%

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British Columbia	2,416	1.5	2,476	2.5	2,551	3.0	2,628	3.0	8.8%
Regional Canada	1,737	3.3	1,794	3.3	1,853	3.3	1,914	3.3	10.2%
Long Haul Canada	1,007	3.0	1,040	3.3	1,074	3.3	1,109	3.3	10.1%
United States	2,329	6.8	2,434	4.5	2,545	4.5	2,661	4.5	14.3%
Mexico	41	16.2	48	16.7	56	16.7	66	16.7	59.0%
Total	7,529	3.8	7,793	3.5	8,079	3.7	8,378	3.7	11.1%

Projections are estimates which are updated quarterly to reflect ongoing changes in markets. Most recent update March 2000.

CHALLENGES

Along with increasing competition from other destinations, the following factors pose major challenges to the B.C. tourism industry:

- Lack of knowledge and awareness of the Super, Natural British Columbia brand among North American consumers.
- The majority of American travel takes place during summer.
- The high cost of intra-provincial air travel remains a deterrent to visitors travelling throughout the province.

OPPORTUNITIES

Tourism continues to be a growth industry in North America. The following factors represent key opportunities for B.C. over the next three years:

- Increasing disposable income and time available for leisure travel among the baby boomer generation.
- Continued strength of the U.S. economy.
- Proximity of the North American market.
- Increased demand for experiences, such as adventure, learning, wildlife, and wellness.
- Increase in shoulder season travel for retirees and empty nesters.
- Successful getaway programs that can be expanded into new markets.
- Increasing hotel capacity in the Lower Mainland allows for renewed emphasis on high demand summer season.

PRIORITIES

Markets

- Investment markets include B.C., Alberta, Ontario, Washington State, Oregon, California (San Francisco Bay area, Los Angeles & San Diego) and Arizona (Phoenix).
- Maintenance markets include Manitoba, Saskatchewan, New York, Texas, Minnesota, Florida, and Illinois.
- Emerging markets are Mexico and South America.

Products

- Tourism BC's major marketing efforts in North America are directed towards the touring sector which includes vacation and getaway programs featuring sightseeing, attractions and cultural experiences.
- Other supported sectors include outdoor and adventure, ski, fishing, guest ranches and other niche products.

Target Audiences

- Our touring and getaway marketing efforts will be directed to:
 - ♦ Repeat visitors, who account for approximately 60% of all touring activities.
 - ♦ High potential travellers, who are frequent travellers,
 - aged 35 - 54 and 55+.
 - with post secondary education,
 - above average household incomes,
 - active lifestyles, and who
 - participate in outdoor activities.

For other product sectors, demographic targets will vary.

NORTH AMERICA MARKETING & SALES STRATEGY

KEY OBJECTIVES

- Contribute to the B.C. industry achieving 3.5% growth in revenue from North American markets in 2000, with cumulative growth of 11.3% by 2002.
- Convert interest in B.C. as a getaway destination into purchase, with emphasis on the spring and fall shoulder seasons.
- Expand awareness and interest into purchase of B.C. as a destination for touring, ski/winter and outdoor and adventure activities.
- Diversify products offered by the travel trade.

KEY STRATEGIES

B.C. will be positioned as a travel destination that offers an affordable, refreshing vacation or getaway experience by providing a unique variety of attractions and experiences against a backdrop of Super, Natural scenery. For city destinations, the focus is to offer a cosmopolitan atmosphere with numerous urban attractions situated against a scenic background.

- Use well-targeted, integrated consumer and trade marketing activities with strong calls-to-action to build the Super, Natural British Columbia brand.
- Encourage getaway travel in key markets with the BC Escapes program using integrated distribution channels such as direct response television, newspaper advertising, direct mail, the Internet and media relations.
- Encourage regional brand and destination development through continued financial support for the Tourism Partners program.
- Create opportunities for tourism businesses to leverage their marketing investments by participating in programs produced by Tourism BC and the Regional Destination Marketing Organizations.
- Continue to support key sectors through cooperative financial partnerships and by providing leadership in marketing plan development, execution and monitoring.
- Increase B.C.'s profile with the travel trade through attendance at trade shows, providing educational support and pursuing co-op marketing opportunities.
- Monitor major programs for cost effectiveness and identify development opportunities.
- Integrate Internet marketing into all Tourism BC programs.

PERFORMANCE MEASURES

- Reach 2.6 million households in North America through distribution of BC Escapes guides; success of the campaign will be measured by the number of inquiries, bookings and revenue generated.
- Through the Tourism Partners program, provide cooperative marketing opportunities to over 800 tourism businesses and promote and distribute over 1.5 million consumer travel guides.
- Participate in 15 trade shows, conduct at least eight trade educational tours and develop five co-op tour operator marketing programs.
- Undertake two product sector studies and one conversion study.

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Asia/Pacific

The Asia/Pacific unit of the Marketing & Sales division works to increase visitor volume and revenues from this region. Working with the Canadian Tourism Commission (CTC), airlines and key tour operators in major markets, Tourism BC representatives based in Japan, Taiwan, and Australia identify and develop tourism opportunities on behalf of B.C. suppliers.

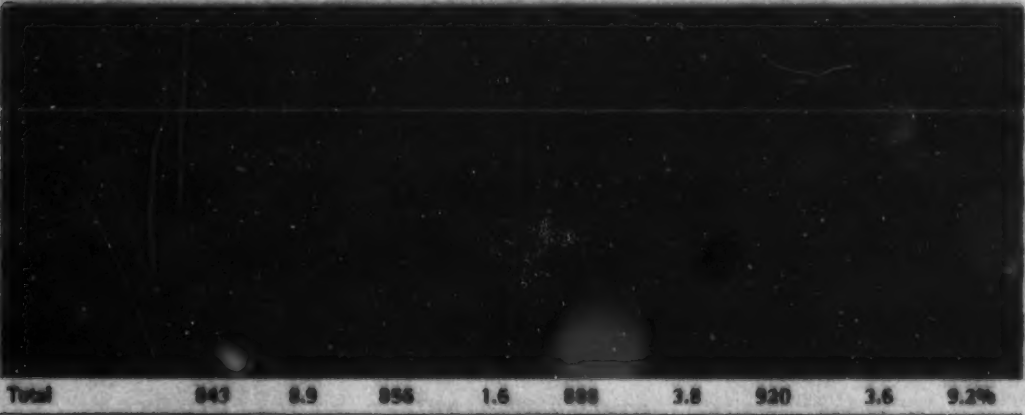
Trade activities include sales calls, trade shows, educational seminars, trade familiarization tours, and trade publications. Consumer-directed activities include joint advertising and promotions with key tour operators and the CTC, development of foreign language consumer publications, and media relations.

VISITOR VOLUME & REVENUE

In 1999, 843,000 visitors came to British Columbia from Asia/Pacific countries, generating \$911 million in revenue. The largest portion of tourism revenues were generated by visitors from Japan at \$289 million; Australia, at \$152 million, and Taiwan at \$145 million. Visitors from Hong Kong generated \$95 million, South Korea contributed \$59 million, China contributed \$40 million and New Zealand contributed \$38 million, with visitors from other Asia/Pacific countries generating \$93 million.

Over the next three years, visitor volumes are forecast to grow by 9.2% to 920,000, reflecting an increase of 77,000 overnight visitors. During the same period total Asia/Pacific visitor revenue is expected to increase 14.4% or \$131 million to \$1.04 billion.

Asia/Pacific Overnight Visitor Volume (000's)



Projections are estimates which are updated quarterly to reflect ongoing changes in markets. Most recent update March 2000.

Asia/Pacific Overnight Visitor Revenue (\$millions)

Total	911	11.1	940	3.1	991	5.4	1,042	5.2	14.4%

Projections are estimates which are updated quarterly to reflect ongoing changes in markets. Most recent update March 2000.

CHALLENGES

- Long-term economic recovery in the Asia/Pacific region is forecast to be slow.
- Air capacity from Japan to Canada has declined, whereas capacity to U.S. has grown steadily.
- The impact of Air Canada's buyout of Canadian Airlines in terms of routes, capacity and partnerships is uncertain, hampering the development of long-term programs.
- There is a lack of available B.C. and Canadian product which addresses late booking trends and increased consumer price sensitivity.
- Sydney 2000 Olympics are likely to reduce short-term outbound travel from Australia and New Zealand and may enhance Australia's competitive position worldwide over the next three years.

OPPORTUNITIES

- Total air capacity from Taiwan has increased.
- Older/affluent consumers in Japan who represent a large share of Japanese visitors to B.C. have been less affected by the economic downturn.
- Consumer demand for experiential and outdoor travel is forecast to grow; these products match B.C.'s tourism product availability.
- Increasing hotel capacity in the Lower Mainland allows for renewed emphasis on high demand summer season.

Asia/Pacific

The Asia/Pacific unit of the Marketing & Sales division works to increase visitor volume and revenues from this region. Working with the Canadian Tourism Commission (CTC), airlines and key tour operators in major markets, Tourism BC representatives based in Japan, Taiwan, and Australia identify and develop tourism opportunities on behalf of B.C. suppliers.

Trade activities include sales calls, trade shows, educational seminars, trade familiarization tours, and trade publications. Consumer-directed activities include joint advertising and promotions with key tour operators and the CTC, development of foreign language consumer publications, and media relations.

In 1999, 843,000 visitors came to British Columbia from Asia-Pacific countries, generating \$911 million in revenue. The largest portion of tourism revenues were generated by visitors from Japan at \$289 million; Australia, at \$153 million, and Taiwan at \$134 million. Visitors from Hong Kong generated \$95 million, South Korea contributed \$69 million, China contributed \$40 million and New Zealand contributed \$38 million, with visitors from other Asia-Pacific countries generating \$94 million.

Over the next three years, visitor volumes are forecast to grow by 9.2% to 920,000, reflecting an increase of 77,000 overnight visitors. During the same period total Asia-Pacific visitor revenue is expected to increase 14.4% or \$131 million to \$1,041 million.

	1999 Overnight Visitors	% Change Overnight Visitors 98 to '99	Forecast Overnight Visitors 2000	% Change Overnight Visitors '99 to '00	Forecast Overnight Visitors 2001	% Change Overnight Visitors '00 to '01	Forecast Overnight Visitors 2002	% Change Overnight Visitors '01 to '02	Forecast % Change in Visitors 1999-2002
Japan	300	-0.7	297	-1.0	300	1.0	306	2.0	2.0%
Australia	129	7.2	122	-5.0	130	6.0	132	2.0	2.7%
New Zealand	32	3.0	31	-2.5	32	3.0	33	2.5	2.9%
Taiwan	114	29.3	120	5.0	124	3.0	127	3.0	11.4%
South Korea	61	61.6	67	10.0	71	5.0	74	5.0	21.3%
Hong Kong	86	-4.8	86	0.0	87	1.0	88	1.0	2.0%
China	36	32.2	42	15.0	46	15.0	55	15.0	52.1%
Other Asia/Pacific	84	10.5	91	7.5	98	7.5	105	7.5	24.2%
Total	843	8.9	856	1.6	888	3.8	920	3.6	9.2%

Projections are estimates which are updated quarterly to reflect ongoing changes in markets. Most recent update March 2000.

	1999 Total Overnight Visitor Revenue	% Change Overnight Revenue '98 to '99	Forecast Overnight Revenue 2000	Forecast % Change Overnight Revenue '99 to '00	Forecast Overnight Revenue 2001	Forecast % Change Overnight Revenue '00 to '01	Forecast Overnight Revenue 2002	Forecast % Change Overnight Revenue '01 to '02	Forecast % Change in Revenue 1999-2002 (11 yrs)
Japan	289	0.8	290	0.5	297	2.5	308	3.5	6.6%
Australia	152	8.8	147	-3.6	158	7.6	163	3.5	7.4%
New Zealand	38	4.6	38	-1.0	39	4.5	41	4.0	7.6%
Taiwan	145	31.2	154	6.6	161	4.5	169	4.5	16.5%
South Korea	59	64.0	66	11.7	71	6.6	75	6.6	26.8%
Hong Kong	95	-3.4	97	1.5	99	2.5	101	2.5	6.7%
China	40	34.1	47	16.7	54	16.7	64	16.7	59.0%
Other Asia/Pacific	93	12.2	102	9.1	111	9.1	121	9.1	29.9%
Total	911	11.1	940	3.1	991	5.4	1,042	5.2	14.4%

Projections are estimates which are updated quarterly to reflect ongoing changes in markets. Most recent report: March 2000.

- Long-term economic recovery in the Asia-Pacific region is forecast to be slow.
- Air capacity from Japan to Canada has declined, whereas capacity to U.S. has improved.
- The impact of Air Canada's merger of Canadian Airlines in terms of routes, capacity, and partnerships is uncertain, hampering the development of long-term programs.
- There is a lack of available B.C. and Canadian product which addresses late booking trends and increased consumer price sensitivity.
- Sydney 2000 Olympics are likely to reduce short-term outbound travel from Australia and New Zealand and may enhance Australia's competitive position worldwide over the next five years.
- Total air capacity from Taiwan has increased.
- Older affluent consumers in Japan who represent a large share of Japanese visitors to B.C. have been less affected by the economic downturn.
- Consumer demand for experiential and outdoor travel is forecast to grow. These products match B.C.'s tourism product availability.
- Increasing hotel capacity in the Lower Mainland allows for renewed emphasis on high-demand summer season.

PRIORITIES

Markets

- Investment markets are Japan, Australia/New Zealand and Taiwan.
- Maintenance markets will continue to be Hong Kong and Korea.
- Emerging markets which continue to be developed include Southeast Asia (Singapore, Thailand, Malaysia, the Philippines) and China.

Products

- Touring represents the largest market potential for all markets, with activities including wildlife viewing, soft adventure, fishing, golf, spas and cultural experiences.
- Other products to be promoted include skiing, as well as niche tours such as spring blossom and hot springs.

Target Audiences

- Leisure travellers with some existing awareness of Canada as a destination, including older couples with above average income and some international travel experience.
- In Japan, the focus is split between those travelling as part of an escorted group and independent travellers on tours with flexible components, with minor emphasis on educational and technical visitors.
- In Australia and New Zealand the focus is on independent travellers looking for nature and city, as well as ski experiences.
- In Taiwan, escorted groups remain the largest potential market.

ASIA/PACIFIC MARKETING & SALES STRATEGY

KEY OBJECTIVES

- Contribute to the B.C. industry achieving 3.1% growth in revenue from Asia/Pacific markets in 2000, with a cumulative growth of 14.4% by 2002.
- Maintain B.C.'s presence within tour operator brochures.
- Ensure that B.C. continues to be well represented within the overall image of Canada.

KEY STRATEGIES

Tourism BC's Asia/Pacific marketing efforts position the province as a travel destination that offers a diverse range of uniquely Canadian experiences combining nature and urban activities within Super, Natural surroundings.

- Continue Tourism BC's in-market representation in Japan, Taiwan and Australia.
- Expand and introduce products such as B.C. Rockies, Thompson Okanagan touring and ski, summer Whistler, rail touring, weddings, and Inside Passage/Vancouver Island; this will be facilitated through trade educational seminars, familiarization tours and foreign language publications.
- Provide opportunities for B.C. tourism businesses to meet overseas tour operators by annually co-hosting Canada's West Marketplace with Travel Alberta.
- Develop measurable co-op marketing campaigns with tour operators to help translate consumer interest into sales.
- Participate in CTC-led integrated consumer campaigns designed to raise awareness as well as provide a strong call-to-action.
- Develop and distribute quality trade and consumer publications to fulfill requests in Japan, Taiwan, Australia, New Zealand, Hong Kong, Korea and Southeast Asia.
- Proactively seek targeted media to gain unpaid coverage of new and existing B.C. products.

PERFORMANCE MEASURES

- Attend 15 trade and consumer shows, conduct 8 - 10 educational seminars for travel trade, and coordinate 25 - 35 trade and media visits to B.C.
- Develop and implement 15 - 20 co-op marketing campaigns with tour operators; specific targets will be set and tracked for inquiries and bookings.
- Distribute 150,000 - 200,000 Tourism BC publications to consumers and trade; these will include Japanese and Mandarin language lure brochures, trade manuals and newsletters, as well as English language Vacation Planners and New Product Bulletins.
- Achieve a minimum of 75% of buyers and sellers rating Canada's West Marketplace as providing good or excellent value for money.
- Success of CTC-led campaigns to be measured by number of inquiries and conversion rates compared to targets set at program inception.

IMPORTANT NOTE CONCERNING THE FOLLOWING PAGES

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Europe

The European Marketing & Sales unit works to increase visitor volume and revenues from this region. Working with the CTC, airlines and key tour operators in major markets, Tourism BC representatives based in the U.K. and Germany work on behalf of B.C. suppliers to identify and develop tourism opportunities.

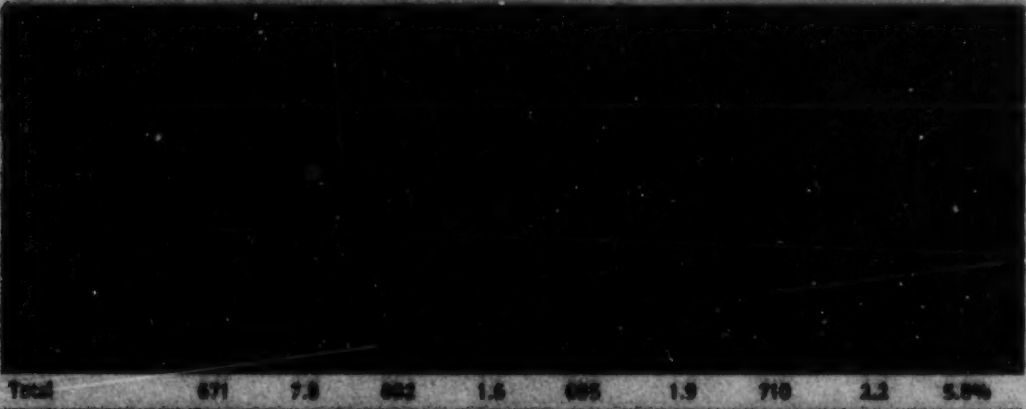
Trade activities include sales calls, trade shows, educational seminars, trade familiarization tours, and trade publications. Consumer-directed activities include joint advertising and promotions with key tour operators and the CTC, development of foreign language consumer publications, and media relations.

VISITOR VOLUME & REVENUE

In 1999, 671,000 visitors came to British Columbia from Europe, generating \$683 million in revenue. The largest portion of tourism revenues were generated by visitors from the U.K. at \$288 million, and Germany at \$163 million. Visitors from the Netherlands generated \$50 million, France contributed \$33 million, Switzerland contributed \$32 million, Italy contributed \$19 million, and Austria contributed \$11 million, with visitors from other European countries generating \$87 million.

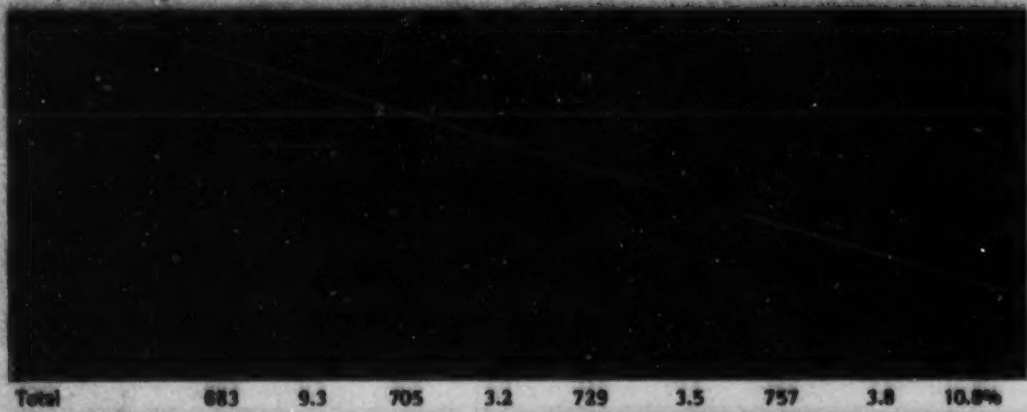
Over the next three years, visitor volumes are expected to increase by 5.8% or 39,000 to a total of 710,000 overnight visitors. During the same period European visitor revenue is expected to increase 10.8% or \$74 million to \$757 million.

Europe Overnight Visitor Volume (000's)



Projections are estimates which are updated quarterly to reflect ongoing changes in markets. Next report update March 2000.

Europe Overnight Visitor Revenue (\$millions)



Projections are estimates which are updated quarterly to reflect ongoing changes in markets. Most recent update March 2000.

CHALLENGES

- The impact on routes, capacity and partnerships resulting from Air Canada's buyout of Canadian Airlines is uncertain, hampering the ability to develop long term programs.
- There is a lack of B.C. and Canadian product which addresses late booking trends and increased consumer price sensitivity.
- Wholesalers are being impacted by trade consolidation and reduced margins, and are reluctant to introduce new products.
- Environmental activism, specifically directed at wildlife, forestry and hunting policies, continues.

OPPORTUNITIES

- Canada is gaining a more positive image in European markets.
- U.K. visitors tend to be younger and more adventuresome; fewer visitors are coming to Canada exclusively to visit friends and relatives.
- The Republic of Ireland has a booming economy and a young, affluent consumer base which may be easily reached through U.K. efforts.
- Consumer demand for experiential and outdoor travel is forecast to grow.
- Interest in western Canada is increasing among the French and Italian travel trade.
- Increasing hotel capacity in the Lower Mainland allows for renewed emphasis on high demand summer season.
- Potential exists to further develop the ski business in most European markets.

PRIORITIES

Markets

- Investment markets continue to be the U.K. and Germany.
- Maintenance markets continue to be the Netherlands, France, Italy, Switzerland, and Austria.
- Emerging markets to be monitored include Ireland, Scandinavia, and eastern Europe.

Products

- Touring represents the largest market potential, with activities including wildlife viewing, soft adventure, fishing, golf, spas and cultural experiences.
- Introduction of Thompson Okanagan and B.C. Rockies ski areas will be actively pursued.

Europe

The European Marketing & Sales unit works to increase visitor volume and revenues from this region. Working with the CTC, airlines and key tour operators in major markets, Tourism BC representatives based in the U.K. and Germany work on behalf of B.C. suppliers to identify and develop tourism opportunities.

Trade activities include sales calls, trade shows, educational seminars, trade familiarization tours, and trade publications. Consumer-directed activities include joint advertising and promotions with key tour operators and the CTC, development of foreign language consumer publications, and media relations.

In 1999, 671,000 visitors came to British Columbia from Europe, generating \$681 million in revenue. The largest portion of tourism revenues were generated by visitors from the U.K. at \$200 million, and Germany at \$161 million. Visitors from the Netherlands generated \$50 million, France contributed \$41 million, Switzerland contributed \$32 million, Italy contributed \$19 million, and Austria contributed \$11 million, with visitors from other European countries generating \$87 million.

Over the next three years, visitor volumes are expected to increase by 9.8% or 19,000 to a total of 710,000 overnight visitors. During the same period European visitor revenue is expected to increase 10.8% or \$74 million to \$757 million.

	1999 Overnight Visitors	% Change Overnight Visitors 98 to 99	Forecast Overnight Visitors 2000	% Change Overnight Visitors 99 to 00	Forecast Overnight Visitors 2001	% Change Overnight Visitors 00 to 01	Forecast Overnight Visitors 2002	% Change Overnight Visitors 01 to 02	Forecast % Change in Visitors 1999-2002 3 yrs
United Kingdom	267	12.0	272	2.0	278	2.0	283	2.0	6.1%
Germany	134	4.5	137	2.0	140	2.5	145	3.0	7.7%
Austria	9	-5.9	9	0.0	9	1.0	10	2.0	3.0%
Switzerland	26	-4.5	26	0.0	26	1.0	27	2.0	3.0%
France	40	14.3	41	2.0	42	2.0	42	2.0	6.1%
Netherlands	61	12.3	63	3.0	64	2.0	65	2.0	7.2%
Italy	23	-7.3	23	0.0	23	2.0	24	2.5	4.5%
Other Europe	111	0.9	111	0.0	112	1.0	114	2.0	3.0%
Total	671	7.8	682	1.6	695	1.9	710	2.2	5.8%

Projections are estimates which are updated quarterly to reflect ongoing changes in markets. Most recent update March 2000.

	1999 Total Overnight Visitor Revenue	% Change Overnight Revenue 98 to 99	Forecast Overnight Revenue 2000	Forecast % Change Overnight Revenue 99 to 00	Forecast Overnight Revenue 2001	Forecast % Change Overnight Revenue 00 to 01	Forecast Overnight Revenue 2002	Forecast % Change Overnight Revenue 01 to 02	Forecast % Change in Revenue 1999-2002 * (1 yrs)
United Kingdom	288	13.7	298	3.5	308	3.5	319	3.5	11.0%
Germany	163	6.0	169	3.5	176	4.0	184	4.5	12.6%
Austria	11	-4.5	12	1.5	12	2.5	12	3.5	7.7%
Switzerland	32	-3.1	32	1.5	33	2.5	34	3.5	7.7%
France	33	36.3	34	3.5	35	3.5	37	3.5	11.0%
Netherlands	50	14.0	52	4.5	54	3.5	56	3.5	12.1%
Italy	19	-5.9	19	1.5	20	3.5	21	4.0	9.3%
Other Europe	87	2.5	89	1.5	91	2.5	94	3.5	7.7%
Total	683	9.3	705	3.2	729	3.5	757	3.8	10.8%

Percentages calculate change in total overnight revenue (excluding lodging charges on motor). Most recent update March 2000

- The impact on routes, capacity and partnerships resulting from Air Canada's buyout of Canadian Airlines is uncertain, hampering the ability to develop long term programs.
- There is a lack of B.C. and Canadian product which addresses late break-out trends and increased customer price sensitivity.
- Wholesalers are being impacted by trade consolidation and reduced margins, and are reluctant to introduce new products.
- Environmental activism, specifically directed at wildlife, fishing and hunting practices, continues.
- Canada is gaining a more positive image in European markets.
- U.K. visitors tend to be volume and more adventure-seeking; repeat visitors are coming to Canada exclusively to visit friends and relatives.
- The Republic of Ireland has a booming economy and a young, affluent consumer base which may be easily reached through U.K. efforts.
- Consumer demand for experiential and outdoor travel is forecast to grow.
- Interest in western Canada is increasing among the French and Italian travel trade.
- Increasing hotel capacity in the Lower Mainland allows for relaxed emphasis on high demand summer season.
- Potential exists to further develop the ski business in most European markets.
- Investment markets continue to be the U.K. and Germany.
- Maintenance markets continue to be the Netherlands, France, Italy, Switzerland, and Austria.
- Emerging markets to be monitored include Ireland, Scandinavia, and eastern Europe.
- Touring represents the largest market potential, with activities including wildlife viewing, soft adventure, fishing, golf, spas and cultural experiences.
- Introduction of Thompson Okanagan and B.C. Rockies ski areas will be actively pursued.

Target Audiences

- Primary focus will be leisure travellers with an existing awareness of Canada, specifically independent travellers purchasing component packages.
- Other target audiences include:
 - skiers who have been to other international resorts;
 - older, affluent consumers and empty nesters with international travel experience; and
 - younger 'adventurers' seeking a combination of nature and city experiences.

EUROPE MARKETING & SALES STRATEGY

KEY OBJECTIVES

- Contribute to the B.C. industry achieving 3.2% growth in revenue from European markets in 2000, with a cumulative growth of 10.8% by 2002.
- Maintain B.C.'s presence in key tour operator brochures.
- Ensure that B.C. continues to be well represented within the overall image of Canada.

KEY STRATEGIES

Tourism BC's marketing efforts in Europe position the province as a travel destination that offers a diverse range of uniquely Canadian experiences combining nature and urban activities within Super, Natural surroundings.

- Continue Tourism BC's in-market representation in the U.K. and Germany.
- Introduce products and routes such as rail/ferry tours, gourmet trail, interior ski resorts and wildlife viewing by providing training and information to tour operators and Canada Travel Specialist retail agents.
- Provide opportunities for B.C. tourism businesses to meet overseas tour operators by annually co-hosting Canada's West Marketplace with Travel Alberta.
- Participate in CTC-led integrated television and print campaigns designed to raise awareness as well as provide a strong call-to-action.
- Develop measurable co-op marketing campaigns with tour operators.
- Proactively seek targeted media to gain unpaid coverage of new and existing B.C. products.
- Develop and distribute quality foreign language publications to fulfill consumer and trade requests in the U.K., Germany, the Netherlands, Italy and France.
- Continue to develop database marketing opportunities in the U.K. and Germany.

PERFORMANCE MEASURES

- Attend 8 - 10 trade shows in Europe, conduct 5 - 8 educational seminars for travel trade, and coordinate 50 - 60 trade and media visits to B.C.
- Distribute 150,000 - 200,000 Tourism BC publications to consumers and trade to include maps, New Product Bulletins, Vacation Planners and lure brochures in multiple languages.
- Develop and implement 15 - 20 co-op marketing campaigns with tour operators; specific targets will be set and tracked for number of inquiries and bookings.
- Success of CTC-led campaigns to be measured by number of inquiries and conversion rates compared to targets set at program inception.
- Achieve a minimum of 75% of buyers and sellers rating Canada's West Marketplace as providing good or excellent value for money.

Tourism Operations

Building Customer Loyalty

The Tourism Operations division works to help build consumer loyalty to all areas of British Columbia. This division works directly with visitors and with industry; its activities touch the consumer at each stage of their B.C. vacation experience, and include fulfilling requests for information, product sales and promoting increased travel. Other key activities include: enhancing standards for facilities, services and amenities, professional development programs for the tourism workforce, and research programs.

Tourism Operations is also responsible for integrating information technology with the corporation's key business strategies. Tourism British Columbia is facing a number of challenges that impact the direction of its information technology, specifically:

- shifts in consumer behaviour patterns; more consumers are purchasing tourism products directly;
- the move to eliminate intermediaries in the purchase cycle; suppliers are streamlining their distribution channels wherever possible, and
- the trend to online business or "e-commerce".

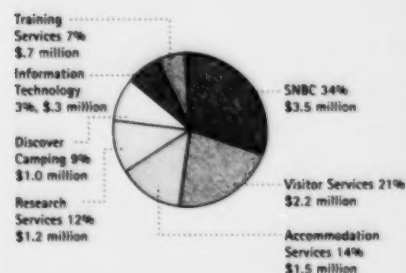
Information technology will support the corporation's move towards becoming a web-enhanced business. By using the web as its primary distribution tool, Tourism BC will improve many of the services provided to its stakeholders and facilitate more direct access to tourism products for consumers.

Tourism Operations Goals

- Increase length of stay and encourage visitors to see different parts of the province.
- Enhance the quality of tourism products and services.
- Assist in developing a professional, well-trained workforce.
- Collect and disseminate information on all markets and visitors.
- Move Tourism BC to an advanced online business.

Tourism Operations Expenditure Summary 2000/2001

Total Budget: \$10.4 million



Target Audiences

- Primary focus will be leisure travellers with an existing awareness of Canada, specifically independent travellers purchasing component packages.
- Other target audiences include:
 - skiers who have been to other international resorts;
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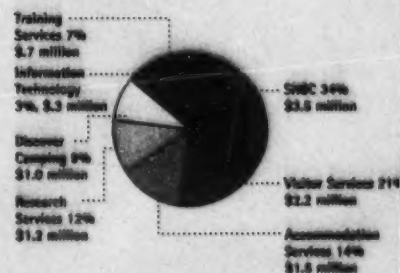
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- Enhance the quality of tourism products and services.
- Assist in developing a professional, well-trained workforce.
- Collect and disseminate information on all markets and visitors.
- Move Tourism BC to an advanced online business.

Tourism Operations Expenditure Summary 2000/2001

Total Budget: \$10.4 million



Super, Natural British Columbia (SNBC) Reservation & Information Service

Tourism BC's toll-free Super, Natural British Columbia Reservation and Information Service (1-800 HELLO BC) may be the consumer's first point of contact in their B.C. vacation experience. More than 700 industry operators subscribe to the service, which handles requests for information and makes bookings on their behalf. SNBC also operates reservation services for Discover Camping, West Coast Trail, Bowron Lake Canoe Circuit and Gwaii Haanas National Park Reserve. In 1999, SNBC received 425,000 calls and booked 70,000 reservations, generating approximately \$15 million in sales of accommodation and other products and services.

Repeat visitation is a key contributor to overall tourism growth. An opportunity exists to develop strong and long-term relationships with key visitors by utilizing the database of callers to the 1-800 HELLO BC call centre. Tourism BC has taken over full ownership of SNBC and is re-evaluating its long-term role, with a view to transforming it into a customer service centre. By operating SNBC as a central point of contact for consumers, the call centre will become the primary communication centre for the Tourism BC web site, ensuring that visitors to www.HelloBC.com receive accurate, friendly and professional assistance in a timely manner.

KEY OBJECTIVES

- Provide central information and reservation services to convert visitor enquiries/calls to bookings and travel to B.C.
- Improve revenue stream for the 1-800 call centre from \$1.17 million to \$1.2 million.
- Maintain customer service levels in a rapidly changing technology environment.

KEY STRATEGIES

- Continue to build partnerships with inventory providers from across the province to expand selection of products and packages for consumer purchase.
- Integrate call centre technology with web site technology and provide call centre support to www.HelloBC.com.
- Replace the current reservation platform with a new web-based application within two years
- Continue to serve as an integrated call-to-action for Tourism BC promotional programs.

PERFORMANCE MEASURES

- 3% increase in revenue from additional package sales and Internet bookings.
- Net annual conversion rate (bookings/enquiries) of 20%.
- Maintain grade of service - 80% of calls answered within 20 seconds.
- Manage average call length of 6 minutes.

Visitor Services

Tourism BC operates four Visitor Info Centres at key Alberta and U.S. border crossings and partners with 110 community-based Visitor Info Centres throughout British Columbia. Every year, these centres welcome approximately 4 million visitors.

Visitor Info Centre staff are often the first personal contact for many visitors, and have the opportunity to encourage visitors to extend their stay and see more of the province. As a result, visitor encounters have expanded from a 2-4 minute "meet and greet" approach to 12 - 20 minute sessions, allowing time to provide travel information and advice, book accommodation, and offer a selection of Super, Natural British Columbia retail merchandise.

The Visitor Services unit also manages the Tourism Product Database, a comprehensive listing of 7,000 tourism products and services, and provides warehousing and distribution support to Tourism BC.

KEY OBJECTIVES

- Provide travel information, reservations and Super, Natural merchandise to visitors.
- Encourage extended stays and improve regional distribution of visitors in the province.
- Increase revenue stream from Tourism BC Info Centres by 3%.

KEY STRATEGIES

- Provide additional support/resources to Tourism BC Info Centres to maximize revenue and servicing opportunities.
- Focus resources against key community Visitor Info Centres that have high potential to impact extended stays and multiple destination visits.
- Provide ongoing training to Visitor Info Centre staff.
- Increase revenue from reservations and merchandising in existing centres, and develop new opportunities for revenue growth from new locations and additional merchandise.

PERFORMANCE MEASURES

- Develop 15 community Visitor Info Centres to offer full service.
- Increase direct sales and royalty program revenue by 3% from \$0.246 million to \$0.254 million.
- Increase average Quality Service Rating program by 2%.

Information Technology

The future Information Technology (IT) environment at Tourism BC must support the direction of the organization toward becoming a web-enhanced business. The Internet will improve many of the services Tourism BC provides to its stakeholders, including becoming a primary distribution tool for the organization and facilitating more direct access to tourism products for consumers. Through the use of the Internet, Tourism BC is beginning a movement toward a customer-facing approach to information and technology. This unit is responsible for operational support, application development and technology planning to ensure IT resources support the organization's current and future business strategies.

KEY OBJECTIVES

- Establish Information Technology standards and guidelines in the organization.
- Develop a five-year migration strategy for Information Technology.
- Implement key application opportunities and increased web-based business activity in years two and three.

KEY STRATEGIES

- Develop standards/policies for data, application and technology activities at the corporate level.
- Confirm corporate IT plan and align with annual IT planning process.
- Integrate current web site development and support activities into overall corporate IT plan.

PERFORMANCE MEASURE

- Development/implementation of IT plan for fiscal 2000/2001, incorporating relevant migration activities for data, application development and technology planning.

Accommodation Services

Accommodation that meets and exceeds visitor expectations plays a vital part in securing loyal, repeat customers. Tourism BC's Accommodation Services unit works with the hospitality industry to enhance accommodations and attractions through industry counselling, approved accommodation programs including Access Canada and Canada Select Accommodation rating, as well as highway signing programs.

This unit produces the annual Accommodation Guide, the most comprehensive directory of approved accommodations in the province. More than 2,700 properties participate in the program. The Canada Select Accommodation Rating Program addresses the trend for consumers to choose accommodation based on a quality rating. The Access Canada Program rates facilities and services provided for seniors and people with disabilities.

KEY OBJECTIVES

- Provide consumers with assurance that B.C. accommodation properties meet their choice and expectations.
- Enhance the quality of accommodation in B.C.
- Increase program revenue.

KEY STRATEGIES

- Provide consumers with quality assurance through inspection and grading programs.
- Work with key accommodation associations to maximize the opportunities to influence quality of the accommodation base throughout B.C.
- Introduce efficiencies by adopting the use of technology and completing inspections on bi-annual inspection cycle.
- Review Accommodation Guide format to ensure continued usability for visitors.
- Distribute guide in key markets to influence consumers' accommodation choice.

PERFORMANCE MEASURES

- Produce 750,000 Accommodation Guides for distribution in 100 countries.
- Increase participation of accommodation properties in all inspection programs by 2%.
- Increase program revenue by 3% from \$1.21 million to \$1.25 million.

Client Services

Training Services

Superior customer service is a key factor in determining the quality of the visitor experience and in building customer loyalty. The Training Services unit works with industry to develop a professional workforce, with training priorities based on the needs of the labour market.

The Training Services unit develops the curriculum materials and supports the trainers who conduct SuperHost Face to Face workshops, Tourism BC's internationally recognized customer service training workshops. Every year, over 25,000 participants attend SuperHost programs. In 1998, a new workshop was introduced, Frontline Management Solutions, designed for managers and supervisors in the tourism and service industry.

Training Services also works with the Pacific Rim Institute of Tourism (PRIT) to deliver other educational and professional development initiatives for the tourism industry, such as occupational standards and certification, apprenticeship and training.

KEY OBJECTIVES

- Provide customer service training to 25,000 workshop participants annually.
- Increase SuperHost program revenues by 3%.
- Support human resources development in B.C. by supporting the activities of the Pacific Rim Institute of Tourism, including certification and standards development and training.

KEY STRATEGIES

- Improve consistency and quality of workshop delivery through training audits and evaluation.
- Expand sales effort to corporate businesses.
- Work with key community delivery organizations to improve local promotional efforts and sales results.
- Demonstrate the benefits of SuperHost by quantifying training results.
- Work with the Pacific Rim Institute of Tourism, the tourism industry and provincial government agencies to establish a structure for coordinating tourism human resource development and policy and activities in B.C.

PERFORMANCE MEASURES

- Complete benchmark survey to measure benefits of SuperHost Frontline Management Solutions.
- Increase program revenues by 3% from \$0.32 million to \$0.34 million.

Research Services

Research Services works to build knowledge, foster insight and share information on tourism for Tourism BC's divisions, the British Columbia tourism industry and its stakeholders. To accomplish the unit's mandate, Research Services monitors the performance of the tourism industry and conducts research and analysis to support business and marketing decisions.

Key tourism research is disseminated to the industry and general public in publications, such as Tourism Indicators, the Tourism Outlook, monthly customs entries, Regional Tourism Indicators and the Value of Tourism.

Recognizing that the current estimates of visitor volumes and revenue are based on a 1995/96 Visitor Study and are becoming dated, Research Services will be developing new research methodologies to track consumer travel patterns. Preliminary tests and overall design of the research approach was prepared in 1999/2000. The program is slated for pilot testing in 2000/2001, with implementation slated for 2001/2002.

KEY OBJECTIVES

- Provide reliable and timely measurement of tourism activity, by market, by visitor, and by industry sector.
- Provide research and analysis for Tourism BC's programs including market analysis and program evaluation.
- Disseminate timely, accurate, relevant and actionable information to British Columbia's tourism industry.

KEY STRATEGIES

- Develop and test a new system for providing regular market information including visitor volumes and revenues, and profiles for all markets.
- Continue to exchange strategic information with industry and government experts, including the CEO Research Advisory Council.
- Provide stakeholder feedback for Tourism BC's program activities through research studies.
- Improve dissemination of market information through an information request line, publications, and the use of www.HelloBC.com.

PERFORMANCE MEASURES

- Complete pilot program and implementation of new volume and revenue estimate system by 2002/2003.
- Complete annual stakeholder survey with over 500 participants.
- Publish eight annual issues of Tourism Indicators, and the annual Tourism Outlook.

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Business Development

Planning and Promoting Growth

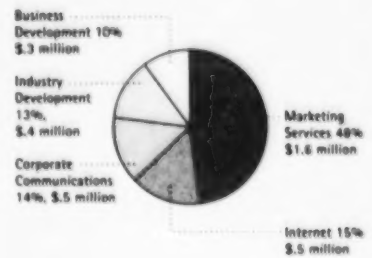
Business Development focuses primarily on generating revenue for Tourism BC to be reinvested in the corporation's business activities. This division also carries out the industry development function and manages communications and marketing services to support Tourism BC's business plans.

Business Development Goals

- Contribute to revenue generation, job creation and balanced growth in the tourism industry.
- Raise awareness and support for Tourism BC and the tourism industry.
- Provide quality and cost effective advertising and publication services.
- Increase trade and consumer awareness of B.C. as a travel destination through media relations.

Business Development Expenditure Summary 2000/2001

Total Budget: \$3.3 million



Business Development

The Business Development unit undertakes initiatives to generate additional sources of revenue through partnerships, merchandising and joint venture programs. This unit also assists in developing exploratory and undeveloped emerging markets, cultural tourism sectors and explores new non-traditional opportunities.

KEY OBJECTIVES

- Develop new sources of revenue and leveraged funding.
- Assist in the development of new or emerging tourism sectors.
- Assist in the development of exploratory and undeveloped emerging markets.

Business Development

Planning and Promoting Growth

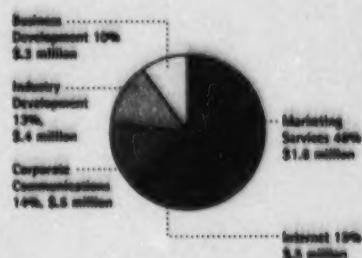
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KEY OBJECTIVES

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- Assist in the development of new or emerging tourism sectors.
- Assist in the development of exploratory and undeveloped emerging markets.

KEY STRATEGIES

- Identify and investigate new funding sources.
- Maintain leveraged funding from the Tourism Alliance for Western and Northern Canada.
- Expand retail merchandising programs to include Internet sales.
- Participate on the cultural tourism steering committee.
- Support the Aboriginal Tourism Association of B.C. development.
- Develop traditional and non-traditional partnerships.
- Investigate and develop joint venture opportunities.
- Support exploratory market initiatives as identified by the Business Development Committee.

PERFORMANCE MEASURES

- Plan and deliver five Aboriginal Tourism road show presentations.
- Introduce one cultural tourism pilot project.
- Increase retail merchandising revenue by 3% from \$0.246 million in 1999 to \$0.254 million in 2000.

Industry Development

Industry Development gathers and maintains an inventory of business information and intelligence to assist the tourism industry in B.C. This unit makes vital material available to the tourism industry through road show presentations, workshops and individual business counselling. Industry Development is the industry's resource for business information and assistance.

KEY OBJECTIVES

- Make Tourism BC the primary source of tourism business information for the tourism industry.
- Create awareness of the business of tourism among all industry stakeholders.
- Assist with the growth and development of the tourism industry.

KEY STRATEGIES

- Develop and maintain an inventory of tourism business information.
- Present Tourism BC road shows in 12 communities across the province.
- Develop and conduct individual stakeholder presentations as requested.
- Expand the Tourism Business Essentials workbook/seminar program, with new topics and more trained presenters in more communities.

PERFORMANCE MEASURES

- Deliver an annual industry awards recognition program.
- Increase regional road show participation by 10% in 2000/01 to 540.
- Develop two new workshop and resource publications and manuals.

Corporate Communications

The Corporate Communications unit develops and manages programs to raise awareness and support for the value of the tourism industry in British Columbia, and for Tourism BC's activities. This unit also informs industry and media about developments affecting tourism in the province, as well as providing on-going management of issues that affect the corporation and the industry.

KEY OBJECTIVES

- Build awareness and support for British Columbia's tourism industry and for Tourism BC's programs and activities.
- Develop and maintain strategic relationships with key industry groups and associations.
- Identify, monitor and effectively manage all tourism related issues facing the corporation.

KEY STRATEGIES

- Expand media, industry and consumer communications through the www.HelloBC.com web site.
- Further expand media relations throughout the province to support marketing campaigns such as BC Escapes, in addition to industry development road shows and other Tourism BC activities.
- Provide on-going monitoring of issues and opportunities and communicate in a timely and effective manner to all Tourism BC stakeholders.

PERFORMANCE MEASURES

- Produce and distribute 24 Super, Natural faxes, 30 media releases, the Program Guide, Business Plan, and Annual Report.
- Manage and deliver 25 major public relations tourism speaking engagements.
- Utilize statistical data to determine general understanding among British Columbians of the tourism business.
- Track awareness of Tourism BC's programs and activities through external analysis.

Marketing Services

Marketing Services develops and produces Tourism British Columbia's family of publications. This unit also provides advertising and production services for Tourism BC and manages the Image Bank, a resource centre of photographs and videos available to industry operators for use in promotional materials. Marketing Services supports Tourism BC's marketing campaigns through an active media relations program in North America and oversees travel media relations worldwide.

KEY OBJECTIVES

- Produce high quality and cost-effective publications.
- Provide quality images of B.C. and its tourism product to industry.
- Increase trade and consumer awareness of B.C. as a top travel destination through unpaid editorial coverage.

KEY STRATEGIES

- Continue to create efficiencies and cost recovery for all publications.
- Develop a long-term publications plan to evaluate the impact of and opportunities on the Internet.
- Implement the new media relations evaluation database program.
- Continue to build relationships with key media in priority geographic and sector markets.
- Increase industry's awareness of the Image Bank.

PERFORMANCE MEASURES

- Achieve 100% cost recovery in the publications program.
- Generate \$25 million in advertising equivalency in editorial coverage worldwide.
- Produce and distribute 440,000 consumer publications, including the Vacation Planner and Outdoor & Adventure Guide.

www.HelloBC.com

The corporation's website, HelloBC.com provides an opportunity to expose B.C. as a travel destination to an estimated 400 million Internet users worldwide. Tourism BC has dedicated resources to develop, enhance, maintain and market the site. The web site is being developed to become the most comprehensive source of travel information for B.C.

KEY OBJECTIVES

- Increase awareness and interest in B.C. as a travel destination.
- Provide consumers with information and tools to effectively plan and book their trip to B.C.
- Increase awareness and understanding of Tourism BC and its programs and activities.

KEY STRATEGIES

- Continue to develop and enhance the consumer and media web site, and increase visitation through online and offline marketing of the site.
- Provide participation opportunities for B.C.'s tourism industry on the site to increase operators' exposure to consumers and provide access to new markets.
- Build relationships and online partnerships with key travel industry companies and other potential partners, including online travel companies to increase exposure and visitation to the site.
- Build the corporate/industry web site to improve industry's access to Tourism BC and facilitate participation and registration in Tourism BC's programs.

PERFORMANCE MEASURES

- Generate 60,000 site visitors per month with 15% repeat visitors in Year One.
- Convert up to 1% of site visits to online bookings in Year One.
- Complete the first phase of the Corporate/Industry web site by December 31, 2000.

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micromedia
a division of IHS Canada

20 Victoria Street
Toronto, Ontario M5C 2N8
Tel.: (416) 362-6211
Toll Free: 1-800-387-2669
Fax: (416) 362-6161
Email: info@micromedia.on.ca

Corporate Services

Supporting Corporate Accountability

Corporate Services forms the infrastructure that supports Tourism British Columbia's operations. This division is responsible for putting the financial and administrative systems and policies in place to ensure efficient, cost-effective performance across the organization and to assist the corporation in achieving its business goals and objectives.

Corporate Services Expenditure Summary 2000/2001 Total Budget: \$2.3 million



KEY OBJECTIVES

- To have a system of performance measures in place that will allow the corporation to demonstrate value for money and accountability in key programs and services.
- To ensure accurate, complete, useful and timely capturing and reporting of financial information for decision making.

KEY STRATEGIES

- Lead the development of business plans that focus on measuring the performance of corporate and program goals and strategies.
- Maintain the integrity of the financial system and continue to provide useful and timely financial statements and reports to key decision makers.

PERFORMANCE MEASURES

- Business plans meet the disclosure recommendations of the Enn's Report for Crown Corporations.
- Financial statements and reports are accurate, complete, useful and are issued monthly at a minimum.
- Program managers are held accountable for their financial management and program delivery.



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Human Resources Development

Supporting Outstanding Employees

The Human Resources Development division is responsible for putting the people and processes in place to build Tourism British Columbia's competitive advantage.

Tourism BC's people are well regarded for the high level of professionalism, dedication and energy they bring to the mission of making British Columbia one of the world's leading travel destinations. The Human Resources Development division develops and leads programs to maintain the high quality of our workforce, including recruitment, administration, labour relations, and training and development.

KEY OBJECTIVES

- Recruit and develop the right people at every level of the corporation.
- Introduce and instill a "values-based" corporate culture.
- Ensure staff perform to high professional standards.

KEY STRATEGIES

- Hire to full staff complement ensuring staff are oriented to human resources practices and policies.
- Clarify, articulate and develop processes for working with values.
- Provide direction in training, development and professional achievement of staff.

PERFORMANCE MEASURES

- Vacant positions filled within four months of vacancy, with high achieving employees.
- Corporate values identified, agreed to and adopted by staff.
- Compliance with corporate Human Resources policies.

Tourism BC Offices

VANCOUVER OFFICE

802-865 Hornby St.
Vancouver, BC V6Z 2G3
Tel: (604) 660-2861
Fax: (604) 660-3383

VICTORIA OFFICE

Box 9830 Stn Prov Govt
300-1803 Douglas St.
Victoria, BC V8W 9W5
Tel: (250) 356-6363
Fax: (250) 387-2815

AUSTRALIA OFFICE

Level 5, 68 Alfred St.
Milsons Point
NSW 2061
Australia
Tel: 61-2-9959-4277
Fax: 61-2-9929-4543
Contact: Fred Sparksman

CALIFORNIA OFFICE

P.O. Box 9107
Whittier, California
90608-9107
USA
Tel: (562) 696-1985
Fax: (562) 696-5615
Contact: John Bateman

GERMANY OFFICE

Johanna-Melber-Weg 12
Frankfurt D-60599
Germany
Tel: 49-69-629282
Fax: 49-69-629264
Contact: Martin Walter

JAPAN OFFICE

Place Canada 3F
3-37 Akasaka, 7-chome
Minato-ku
Tokyo 107-0052 Japan
Tel: 81-33-408-1973
Fax: 81-33-408-1950
Contact: Tomoko Kikuchi

U.K. OFFICE

British Columbia House
3rd Floor, 3 Regent St.
London SW1Y 4NS
United Kingdom
Tel: 44-207-930-6857
Fax: 44-207-930-2012
Contact: Ruth Kolish or Susan
Schoenhals

TAIWAN OFFICE

7G03, 7th Floor, No. 5, Sec. 5
Hsin-Yi Road
P.O. Box 109-857
Taipei, Taiwan
Tel: 886-2-2722-0805
Fax: 886-2-2723-9364
Contact: Christine Chang